Research Analyst

Vista Capital Partners

Vista Capital Partners is a leading financial advisor in the Pacific Northwest. Our investment philosophy, standard-setting client service, and engaging work environment has helped us become a career destination for top talent. Vista's core purpose is to build happier and more prosperous lives.

We believe a healthy work/life balance is essential—happy employees provide excellent service to our clients. To elevate the employee experience, we engage in regular team-building exercises, provide time for employees to volunteer in the community, and offer periodic sabbaticals.

Vista's continued growth has created an opportunity for us to add a new Research Analyst to our team of professionals.

Duties and Responsibilities

This position will work closely with our Chief Wealth Officer, Director of Investments and Director of Financial Planning.

The Research Analyst can expect to:

- Serve on both the Financial Planning and Investment Committees.
- Help identify and research relevant financial planning projects.
- Assist Investment Committee with market, fund, and performance-related research.
- Support client service teams with client-ready presentations and deliverables.
- Attend client account review meetings.
- Assist with client experience related projects.
- Identify system, process and research tool improvements and help implement changes.

Core Values

We will hire the person who best embodies and embraces Vista's core values:

- **Act with Integrity**

  Successful relationships are built on trust.
- **Strive for Simplicity**

  Keeping things simple allows us to focus on what truly matters.
- **Be Passionate**

An unwavering belief in what we're doing brings out the best in us. Passion inspires and is contagious.

- **Demand Excellence**

  Our clients and colleagues deserve our best effort. Always.

- **Enjoy the Journey**

  A fun and flexible work environment allows our people to enjoy happy and fulfilling lives.

Qualifications

The successful Research Analyst candidate will typically possess the following qualifications:

- Ability to work independently, research issues and present recommendations.
- Strong attention to detail and ability to organize, analyze and present data.
- Minimum 1- 3 years of experience in the financial services industry (internship experience may qualify).
- Strong Excel skills.
- Knowledge of Schwab Institutional, YCharts, Morningstar, and/or DFA Returns is a plus.
- Desire to work towards CFA or CFP certification.
- Bachelor's Degree in Business, Finance, Economics, or related field.

How to Apply

Interested applicants should send their resumes with a cover letter to: Tana Thomson, tana@vistacp.com. Mailing address is:

Vista Capital Partners

9755 S.W. Barnes Road, Suite 595

Portland, OR 97225

We will contact you if we believe your qualifications meet our needs. Thank you!

VISTA CAPITAL PARTNERS IS AN EQUAL OPPORTUNITY EMPLOYER